



**Tasks**

**Tasks****3**

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# 1 Tasks

This feature allows you to create a number of tasks associated with an occurrence. These tasks are then associated with the units for an occurrence. Any number of tasks can be associated with a unit, and a task can be linked to more than one unit.

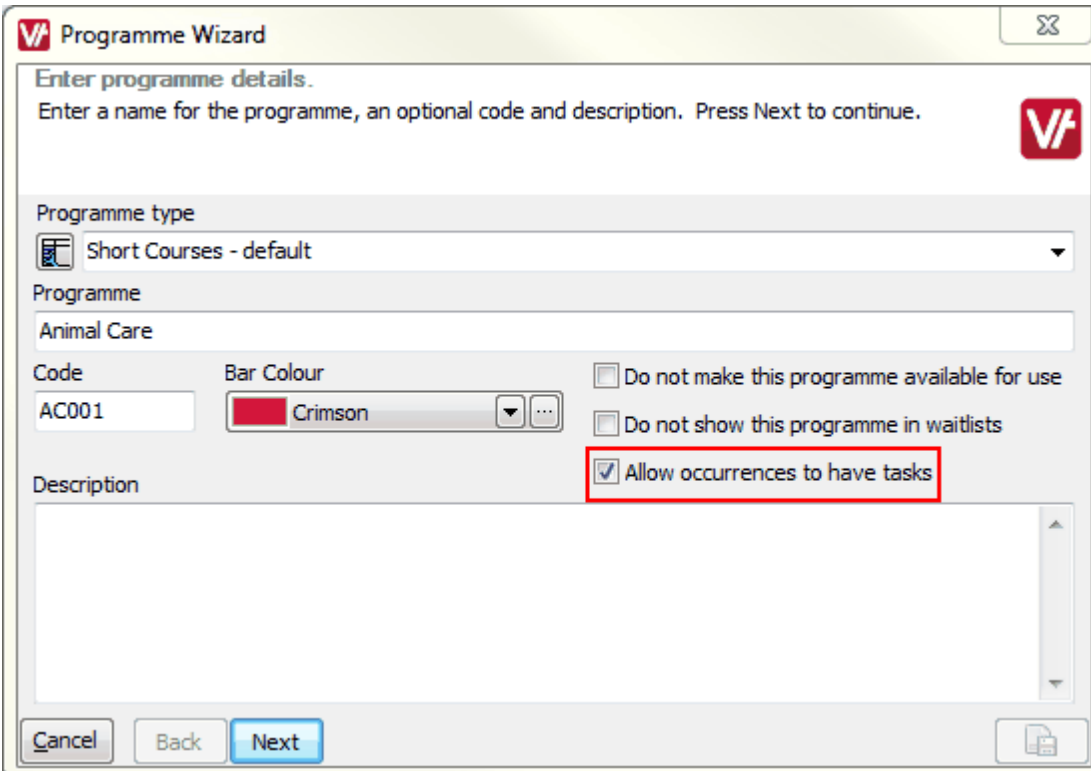
It is then possible to set things up so that a unit can be automatically assigned a result when activity is recorded against task(s) associated with it. This is optional, and you can choose what result, if any, should be automatically recorded.

Note that if a task linked to more than one unit is started or completed, a result will be recorded for all units it is linked to, which may differ depending on whether all other tasks for each unit have also been started/completed or not.

## 1.1 Configuration Manager

### Programme Wizard

Indicate in the Programme Wizard if tasks are to be used in occurrences of that programme.

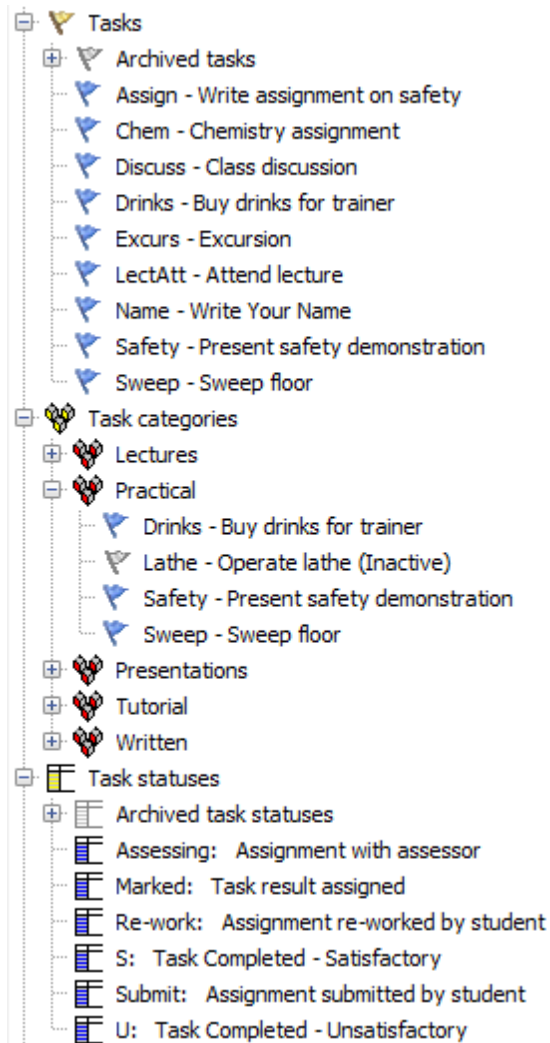


The screenshot shows the 'Programme Wizard' dialog box. The title bar says 'Programme Wizard'. The main text says 'Enter programme details. Enter a name for the programme, an optional code and description. Press Next to continue.' There is a 'Vf' logo in the top right corner. The form has several fields: 'Programme type' with a dropdown menu showing 'Short Courses - default'; 'Programme' with a text field containing 'Animal Care'; 'Code' with a text field containing 'AC001'; 'Bar Colour' with a color picker showing 'Crimson'; and a 'Description' text area. There are three checkboxes on the right: 'Do not make this programme available for use' (unchecked), 'Do not show this programme in waitlists' (unchecked), and 'Allow occurrences to have tasks' (checked). The 'Allow occurrences to have tasks' checkbox is highlighted with a red box. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons, and a 'Save' icon in the bottom right corner.

### Task Nodes

Three nodes and wizards in the Configuration Manager relate specifically to tasks:

- Tasks / Task Wizard
- Task Categories / Task Category Wizard
- Task Statuses / Task Status Wizard




**Task Wizard** ✕

**Enter task details.**  
Enter a name, a code, a category and a description for the task. Press Next to continue.

Name  Code

Category  ☐ Do not make this task available for use

Description

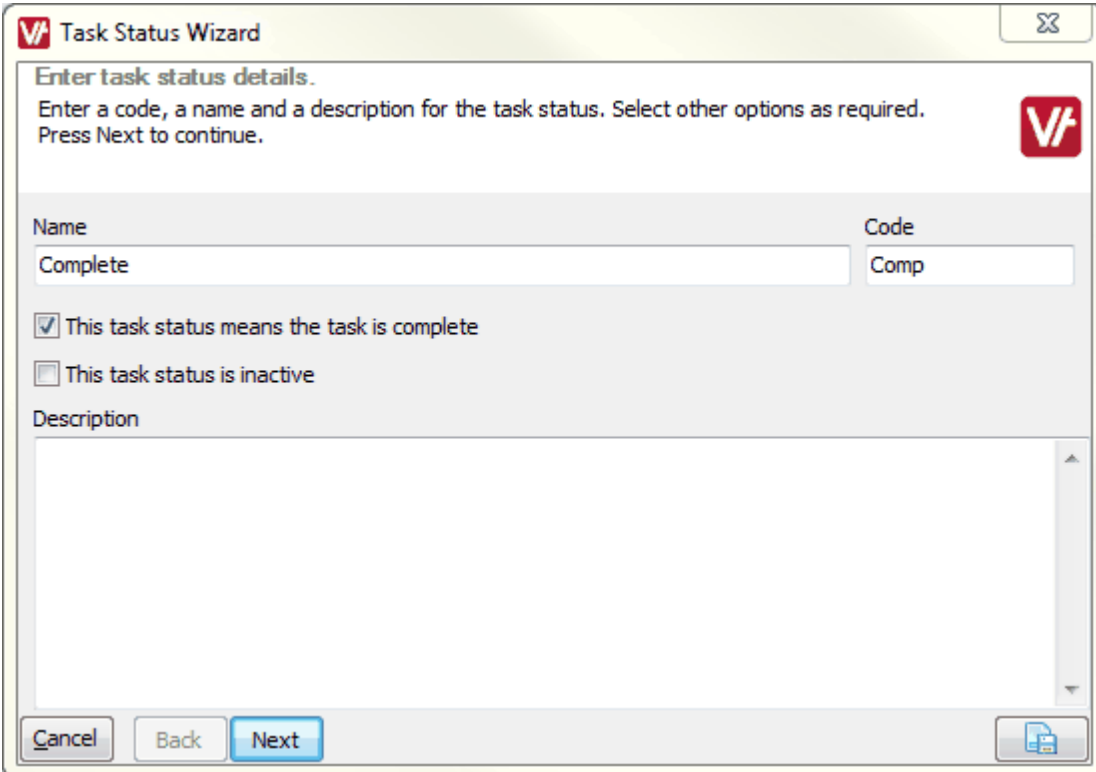


**Task Category Wizard** ✕

**Enter task category details.**  
Enter a code, a name and a description for the task category. Press Next to continue.

Name  Code

Description



**Task Status Wizard**

**Enter task status details.**  
Enter a code, a name and a description for the task status. Select other options as required.  
Press Next to continue.

**Name**  
Complete

**Code**  
Comp

☒ This task status means the task is complete  
☐ This task status is inactive

**Description**

Cancel Back Next

The image shows a 'Task Status Wizard' dialog box. It has a title bar with a close button. The main area contains instructions to enter task status details, including a name, code, and description. The 'Name' field is filled with 'Complete' and the 'Code' field is filled with 'Comp'. There are two checkboxes: 'This task status means the task is complete' (checked) and 'This task status is inactive' (unchecked). The 'Description' field is empty. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons, along with a small icon of a document with a plus sign.

## 1.2 Task Configuration Wizard

A utility has been added that allows you to set up the rules for automatic resulting of units when activity is recorded for tasks associated with them. This is accessed via **Utility > Configure task settings**.

There are two scenarios that need to be accounted for - what should happen to a unit when:

- The first task associated with it is started or completed.
- All tasks associated with it are completed.

1. If this box is ticked, a unit will automatically receive the selected result type when activity is recorded for the first task associated with it.  
**NOTE:** If the unit in question has an existing result, this setting will have no effect - the existing result will NOT be overwritten.
2. Select the result type to be allocated to a unit when activity is recorded for the first of its tasks. Normally this would be a continuing-type result.  
**NOTE:** If the unit in question has an existing result, this setting will have no effect - the existing result will NOT be overwritten.
3. The value set here determines what end date is allocated to units that are automatically given a result by the settings above. The end date for the unit will be set to the configured number of months after the latest task start date.  
**NOTES:**
  - If the end of the enrolment is earlier than the date calculated by this value, the end date of the enrolment will be set instead.
  - However, if the latest task start date is also after the enrolment end date, then the the number of months as set here will be used.
4. If units are to be automatically started when activity is recorded for a task, indicate whether the task activity needs to have a completion date to trigger the start of the unit, or whether commencement of a task is sufficient.
5. If units are to be automatically started or completed when activity is recorded for a task, indicate how the unit start date is to be calculated.  
**NOTE:** If a unit already has a start date recorded, this will not be overwritten; the existing start date will be used.

6. If this box is ticked, a unit will automatically receive the selected result type when the person completes all tasks associated with it.

**NOTE:** If the unit in question has an existing completed-type result, this setting will have no effect - the existing result will NOT be overwritten.

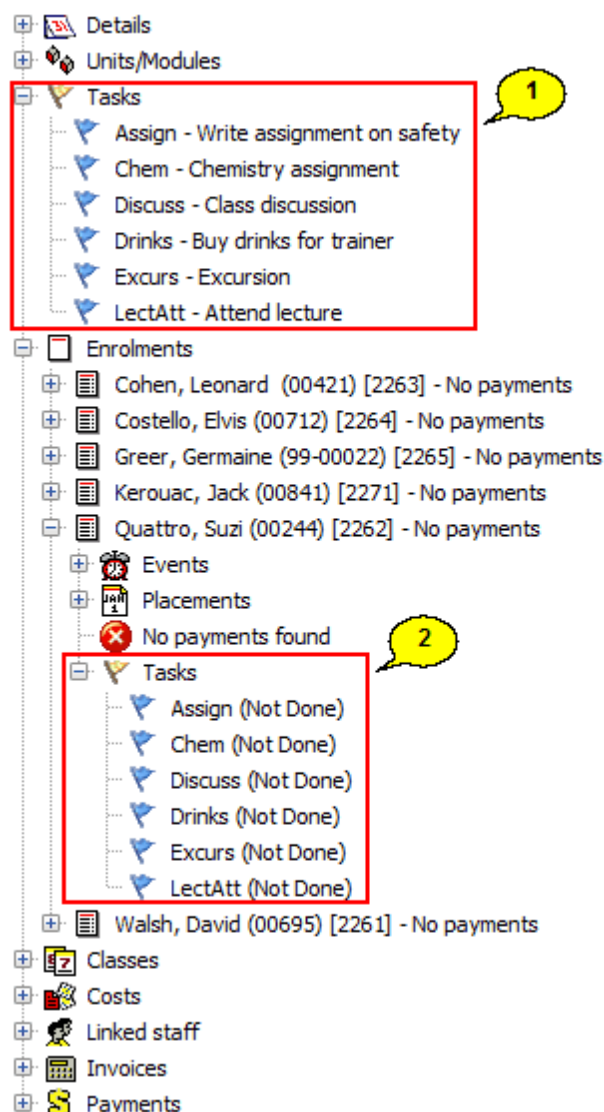
7. Select the result type to be allocated to a unit when all of its tasks are completed. Normally this would be a completion-type result.

**NOTE:** If the unit in question has an existing completed-type result, this setting will have no effect - the existing result will NOT be overwritten.

## 1.3 Programme Manager

### 1.3.1 Tasks Nodes

Two new **Tasks** nodes have been added:

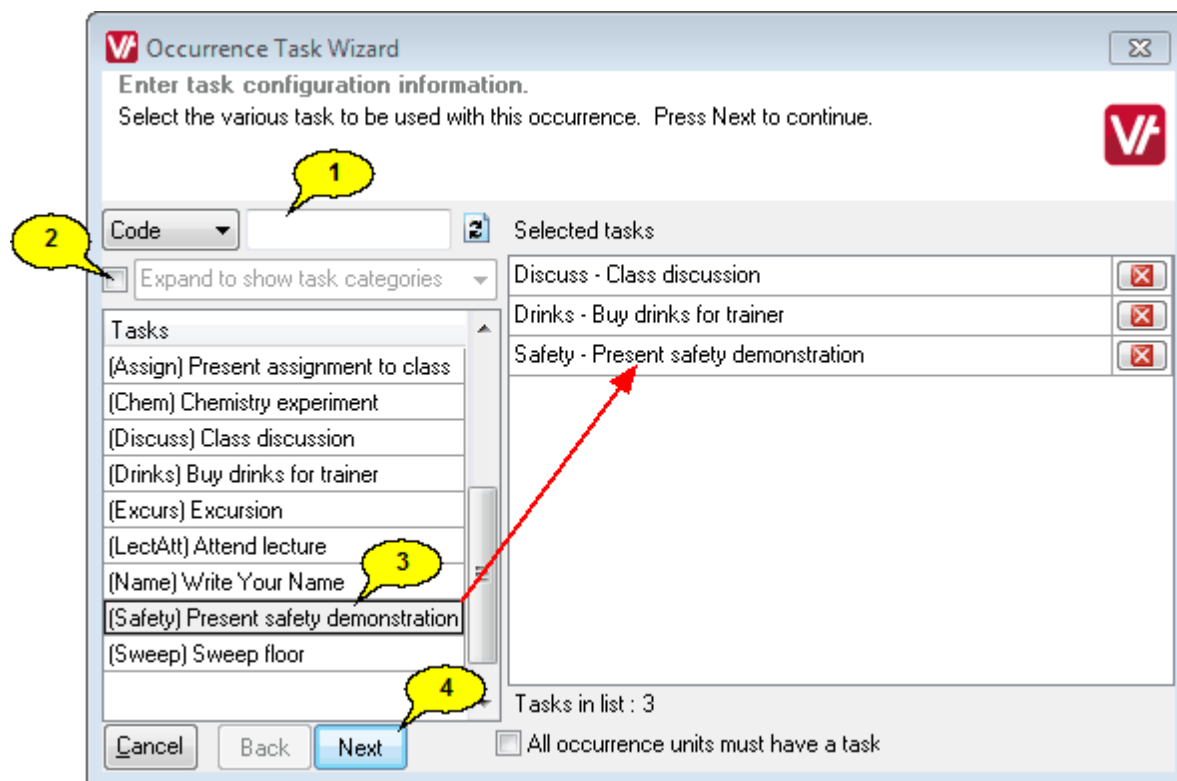


1. A **Tasks** node for the occurrence shows all tasks associated with that occurrence.
2. Another **Tasks** node under each individual enrolment shows only the tasks associated with that person's enrolment. This may differ from the list of tasks for the occurrence if the person is not enrolled in all units of the occurrence.

### 1.3.2 Occurrence Tasks Wizard

A wizard has been added to allow you to select tasks for the occurrence and specify which tasks are linked to which units. To open this wizard, right-click on the **Tasks** node for the occurrence and select **Configure occurrence tasks**.

The first page of the wizard allows you to select tasks for the occurrence, and works in a similar way to the unit selection page of the Occurrence or Enrolment Wizard:



1. Search for the tasks by code or name, or
2. Tick the box to search according to the task category.
3. Double-click on the tasks you want to add to the occurrence, or drag and drop them to the right hand panel.
4. When you have selected all the tasks for the occurrence, click **Next** to move on.

The second page of the wizard allows you to specify which tasks are linked to which units:

**Occurrence Task Wizard**

Save task configuration information.  
Configure the units with tasks for this occurrence. Press Next to continue.

Task (Safety) must be linked to at least one unit.

**Unit View** | Task View

Unit Code	Unit Name
BSBADM101	Use business equipment and resources
BSBWOR201	Organise and complete daily work activities

Use	Task Code	Task Name	Category
<input checked="" type="checkbox"/>	Discuss	Class discussion	Tut
<input type="checkbox"/>	Drinks	Buy drinks for trainer	Prac
<input type="checkbox"/>	Safety	Present safety demonstration	Pres

Cancel Back Next ☒ All occurrence units must have a task

**Occurrence Task Wizard**

Save task configuration information.  
Configure the units with tasks for this occurrence. Press Next to continue.

Task (Safety) must be linked to at least one unit.

**Unit View** | Task View

Task Code	Task Name
Discuss	Class discussion
Drinks	Buy drinks for trainer
Safety	Present safety demonstration

Use	Unit Code	Unit Name
<input type="checkbox"/>	BSBADM101	Use business equipment and resources
<input type="checkbox"/>	BSBWOR201	Organise and complete daily work activities

Cancel Back Next ☒ All occurrence units must have a task

1. Click on the **Unit View** tab, and
2. Tick the tasks that are to be associated with that unit, or
3. Click on the **Task View** tab, and
4. Select the units to associate the task with.
5. By default, all units must be linked to a task. If you want to allow units without tasks, untick this box.

**NOTES:**

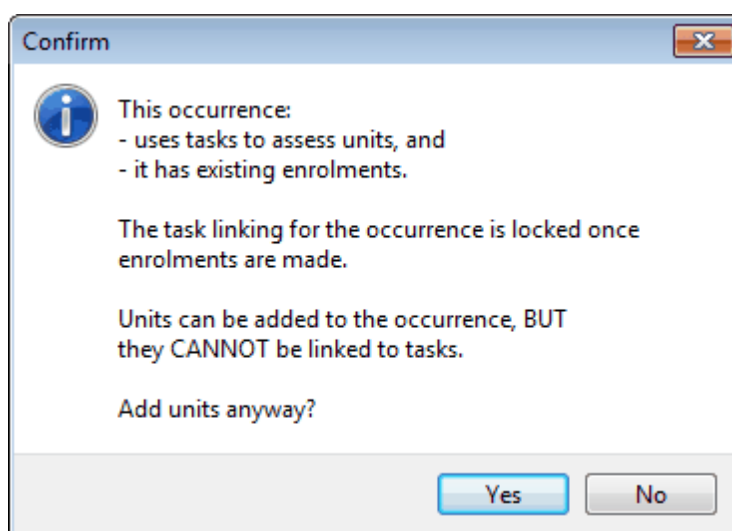
- Although it is possible to have units without tasks linked to them, the reverse is not possible. **All tasks must be associated with at least one unit.**
- Once people are enrolled in the occurrence, it is no longer possible to change the task configuration. The wizard can still be opened in read-only mode. In this case the first page of the wizard will not be shown, and it will be possible only to view the information in the Unit View and Task View tabs; it will not be possible to tick or untick any items.

### 1.3.3 Occurrence Enrolments

When a person is enrolled into an occurrence, their enrolment automatically receives the tasks and their mappings to units from the occurrence. It is not possible to change the task mappings for individual enrolments.

### 1.3.4 Adding Units

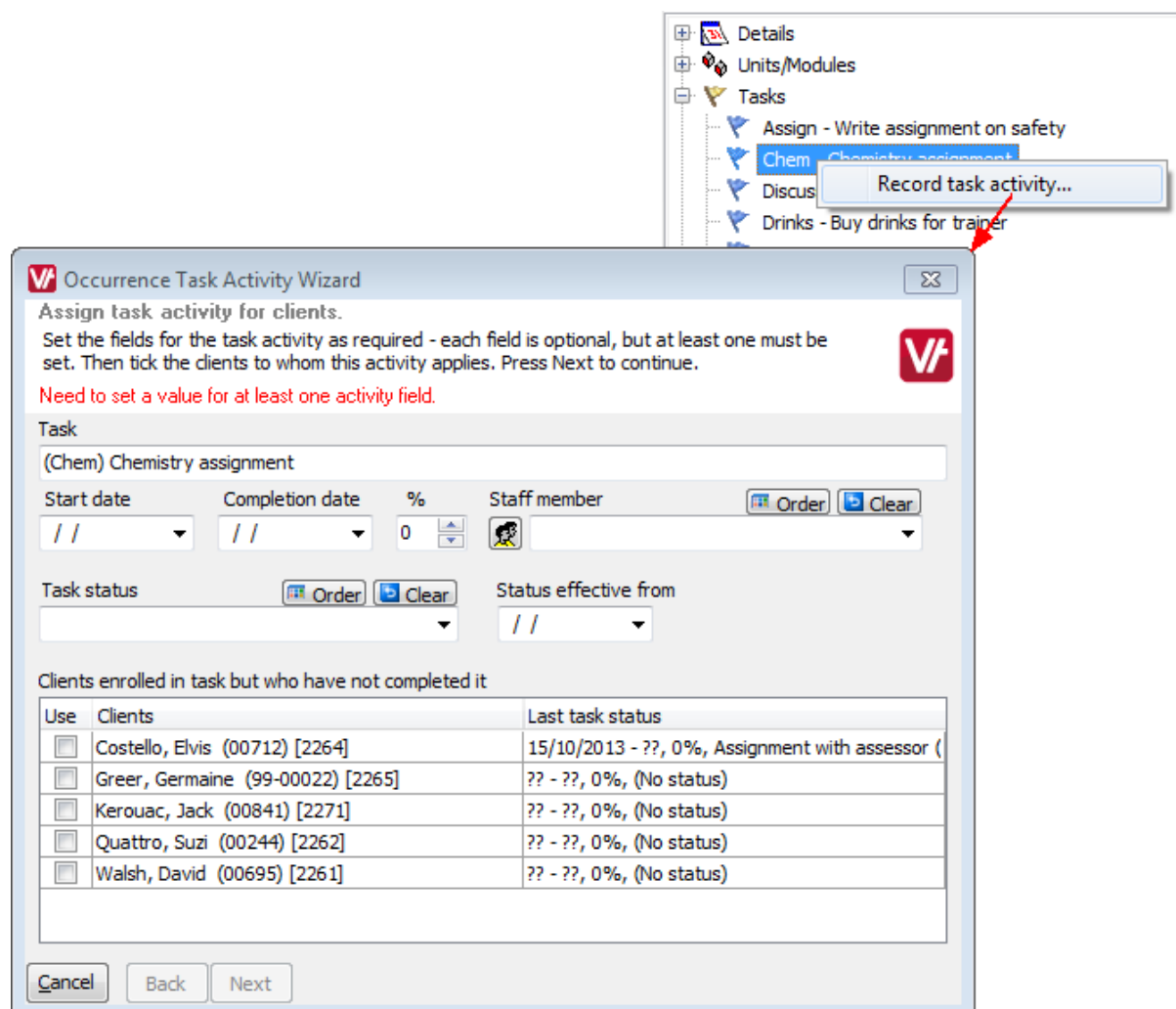
If an occurrence that uses tasks already has enrolments, it is still possible to add a unit to the occurrence, but it will not be possible to link that unit to any tasks. A warning message to this effect will be displayed:



### 1.3.5 Recording Task Activity

You can record activity associated with a task either:

- On a per task basis (recording the same activity for several students at once)



**Occurrence Task Activity Wizard**

Assign task activity for clients.  
Set the fields for the task activity as required - each field is optional, but at least one must be set. Then tick the clients to whom this activity applies. Press Next to continue.  
*Need to set a value for at least one activity field.*

**Task**  
(Chem) Chemistry assignment

Start date: // Completion date: // %: 0 Staff member: [Order] [Clear]

Task status: [Order] [Clear] Status effective from: //

Clients enrolled in task but who have not completed it

Use	Clients	Last task status
<input type="checkbox"/>	Costello, Elvis (00712) [2264]	15/10/2013 - ??, 0%, Assignment with assessor (
<input type="checkbox"/>	Greer, Germaine (99-00022) [2265]	?? - ??, 0%, (No status)
<input type="checkbox"/>	Kerouac, Jack (00841) [2271]	?? - ??, 0%, (No status)
<input type="checkbox"/>	Quattro, Suzi (00244) [2262]	?? - ??, 0%, (No status)
<input type="checkbox"/>	Walsh, David (00695) [2261]	?? - ??, 0%, (No status)

[Cancel] [Back] [Next]

- On a per enrolment basis (recording activity on several tasks for a single person at once).

**Enrolment Task Activity Wizard: Anderson, Laurie (00848) [2286]**

Assign task activity for client.  
Set the details for each task as required. Enter a completion date only when the task is fully completed. Press Next to continue.

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Assign	Write assignment on safety								...
Chem	Chemistry assignment								...
Discuss	Class discussion								...
Drinks	Buy drinks for trainer								...
Excurs	Excursion								...
LectAtt	Attend lecture								...

Cancel Back Next

In both cases, most of the fields in the wizard are optional, giving you maximum flexibility in how you record activity.

While the eventual aim is to record when each task is completed, you can also choose to record as much or as little information as you like along the way. Examples of things you may want to do include:

- [Simply recording when a task is completed](#) <sup>14</sup>.
- Recording when a task is started, and then later, when it is completed.
- [Keeping track of a task through a number of different stages](#) <sup>17</sup>
- Recording only a comment for a task
- Recording only a staff member to be associated with the task

As you can record changes in the task's activity and status as often as you like, there is no limit to the number of scenarios you may want to cater for.

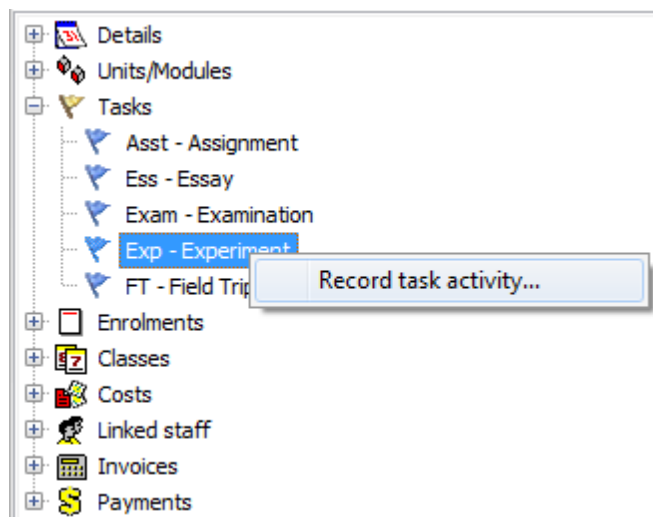
### 1.3.5.1 Recording Task Completion

There are two ways to record task completion:

- **Per task** - select a task and record completion for multiple clients at once.
- **Per enrolment** - select an individual enrolment and record completion for multiple tasks at once.

#### Recording Task Completion per Task

Right-click on a task, and select **Record task activity**.



**Vf Occurrence Task Activity Wizard**

Assign task activity for clients.  
Set the fields for the task activity as required - each field is optional, but at least one must be set. Then tick the clients to whom this activity applies. Press Next to continue.

**Task**

(Exp) Experiment

Start date: 7/10/2013    Completion date: 16/10/2013    %: 75    Staff member: Bail, Glen - 01030

Task status: TCS - Task Completed - Satisfactory    Status effective from: 16/10/2013

Clients enrolled in task but who have not completed it

Use	Clients	Last task status
<input checked="" type="checkbox"/>	Inbaseelan, Balmer Null (022257) [4829]	?? - ??, 0%, (No status)
<input checked="" type="checkbox"/>	Jacobs, Noel (00523) [4831]	?? - ??, 0%, (No status)
<input type="checkbox"/>	Keesmaat, Jo (00151) [4832]	?? - ??, 0%, (No status)
<input checked="" type="checkbox"/>	Kuper, Claire (01631) [4833]	?? - ??, 0%, (No status)
<input type="checkbox"/>	ald, Cheryl (00832) [4834]	?? - ??, 0%, (No status)

Buttons: Cancel, Back, Next

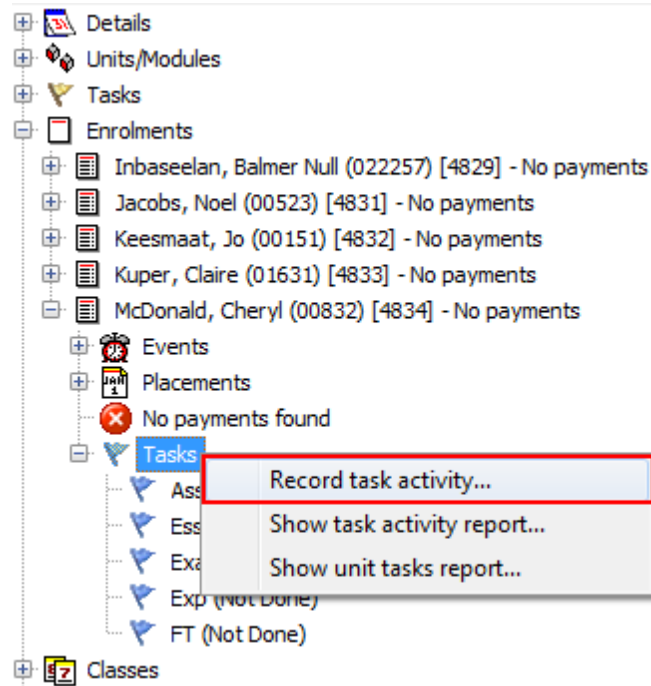
1. Set the start date of task.
2. Set the completion date of the task.

3. (Optional) Set the percentage mark granted for the task.
4. (Optional) Select the staff member associated with the task
5. Select the completion status for the task.
6. Set the date that this status takes effect.
7. Tick the clients who have completed the task, or tick the **Use** heading to tick them all at once.
8. Click **Next** and **Finish** to save.

If this task is the first or last task to be completed for any unit in a client's enrolment, then that unit will have a result assigned in line with the settings in the [Task Configuration Wizard](#) <sup>74</sup>.

### Recording Task Completion per Enrolment

Expand the enrolment, right-click on the **Tasks** node under the enrolment, and select **Record task activity**.



**VFA Enrolment Task Activity Wizard: McDonald, Cheryl (00832) [4834]**

Assign task activity for client.  
Set the details for each task as required. Enter a completion date only when the task is fully completed. Press Next to continue.

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Asst	Assignment	14/10/2013	16/10/2013	Task Completed - Sat	16/10/2013	Bail, Glen	75		...
Ess	Essay								...
Exam	Examination								...
Exp	Experiment								...
FT	Field Trip								...

Cancel Back Next

1. Set the date the task was started.
2. Set the date the task was completed.
3. Select the completion status for the task.
4. Set the date that this status takes effect.
5. (Optional) Select the staff member associated with the task
6. (Optional) Set the percentage mark granted for the task.
7. (Optional) Enter any notes or comments regarding this task.
8. It is also possible to track the status of a task through several stages, rather than just marking it as complete. This button allows you to see a history of the task's progress. See the [Tracking Task Status](#) section for more information.

If any task is the first or last task to be completed for any unit in this enrolment, then that unit will have a result assigned according to the settings in the [Task Configuration Wizard](#).

**NOTES:**

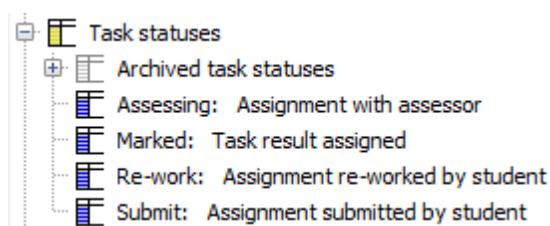
- When completing tasks in this manner, there can be several 'first completed' tasks recorded at once.
- If a unit has no existing completed task or result, and more than one of its associated tasks is completed on a single run through this wizard, the earliest recorded task completion date will be set as the unit start date.

**1.3.5.2 Tracking Task Status**

It is possible to track a task through several stages and see a history of the student's progress through the task, as well as seeing what stage the task is currently at. This can be particularly useful for tracking the various stages that an assignment might go through, such as:

- Submitted by student
- Sent to teacher for marking
- Returned to student for reworking
- Resubmitted by student
- Mark awarded.

To track assignments this way, you would first set up Task Statuses corresponding to each stage that the assignment might go through:



It is then possible to record a succession of different task statuses and see a record of the task's progress. For example, an assignment might go through a process like this:

- Submitted by student
- Passed on to trainer for marking
- Returned to student for reworking because it was unsatisfactory
- Resubmitted by student
- Passed on to trainer again
- Mark awarded

We start by recording the first task status, in the same way as described for [Recording Task Completion](#)<sup>14</sup>, except that we do not record a Completion Date.

**We do not record a completion date for any stage of the process until the task has been completed.**

**Enrolment Task Activity Wizard: Kerouac, Jack (00841) [2271]**

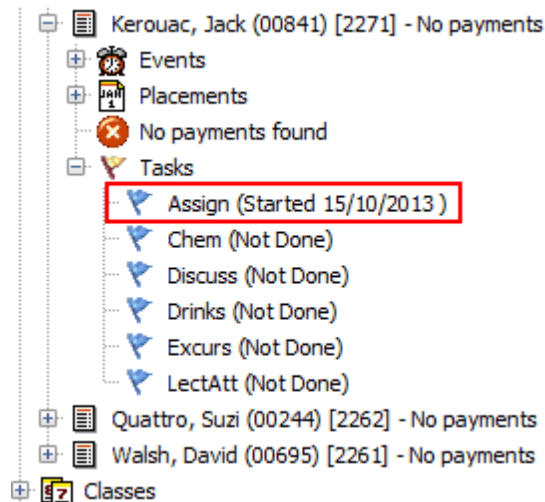
Assign task activity for client.  
Set the details for each task as required. Enter a completion date only when the task is fully completed. Press Next to continue.

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Assign	Write assignment on safety	15/10/2013		Assignment submitted by student	15/10/2013	Flintstone, Wendy			...
Chem	Chemistry assignment								...
Discuss	Class discussion								...
Drinks	Buy drinks for trainer								...
Excurs	Excursion								...
LectAtt	Attend lecture								...

Cancel Back Next

The assignment was submitted by the student on 15/10/2013 and given to Wendy Flintstone, who works at the student admin desk.

Once the first status has been recorded for the task, it will appear as "Started" in the list, followed by the specified start date.



Wendy straight away passes the assignment on to the assessor for marking, so we open the wizard again and record this as our next status:

**Enrolment Task Activity Wizard: Kerouac, Jack (00841) [2271]**

Assign task activity for client.  
Set the details for each task as required. Enter a completion date only when the task is fully completed. Press Next to continue.

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Assign	Write assignment on safety	15/10/2013		Assignment with assessor	15/10/2013	Cassady, Neal			...
Chem	Chemistry assignment								...
Discuss	Class discussion								...
Drinks	Buy drinks for trainer								...
Excurs	Excursion								...
LectAtt	Attend lecture								...

Cancel Back Next

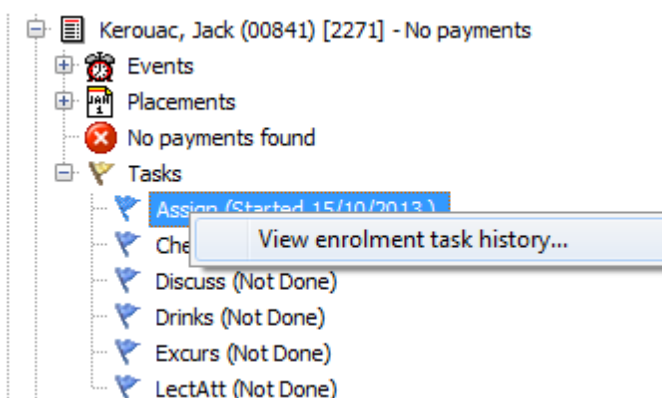
The assignment has been passed on to the assessor, Neal Cassady, on 15/10/2013.

If the assignment needs to go back to the student for more work, we can record this as the next status:

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Assign	Write assignment on safety	15/10/2013		Assignment re-worked by student	17/10/2013	Cassady, Neal		Needs more detail	...
Chem	Chemistry assignment								...
Discuss	Class discussion								...
Drinks	Buy drinks for trainer								...
Excurs	Excursion								...
LectAtt	Attend lecture								...

Neal Cassady has returned the assignment to the student on 17/10/2013. Note that we do not change the start date - the date the assignment is returned to the student is recorded under Date of Status Change.

At any point, we can see where the assignment is by right-clicking on the individual task and clicking **View enrolment task history**.



We can now see where the assignment is by looking at the most recent status. In this case, the last status is "Assignment re-worked by student", so we know the assignment is currently with the student.

Task Code	Start Date	Completion Date	Completion date recorded by	Task Status	Date of status change	Staff	%	Comments	Recorded on	Recorded by
Assign	15/10/2013			Assignment submitted by student	15/10/2013	Flinstone, Wer			15/10/2013 10:...	VETtrak, Tr
Assign	15/10/2013			Assignment with assessor	15/10/2013	Cassady, Neal			15/10/2013 10:...	VETtrak, Tr
Assign	15/10/2013			Assignment re-worked by student	17/10/2013	Cassady, Neal		Needs more detail	17/10/2013 10:...	VETtrak, Tr

We then record when the assignment comes back to the assessor...

**Vf** Enrolment Task Activity Wizard: Kerouac, Jack (00841) [2271]

Assign task activity for client.  
Set the details for each task as required. Enter a completion date only when the task is fully completed. Press Next to continue.

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Assign	Write assignment on safety	15/10/2013		Assignment with assessor	21/10/2013	Cassady, Neal			...
Chem	Chemistry assignment								...
Discuss	Class discussion								...
Drinks	Buy drinks for trainer								...
Excurs	Excursion								...
LectAtt	Attend lecture								...

Cancel Back Next

The assignment is submitted to the assessor again on 21/10/2013.

...and when a result is finally assigned. At this point we also record the completion date, and optionally, the mark assigned.

**VF** Enrolment Task Activity Wizard: Kerouac, Jack (00841) [2271]

Assign task activity for client.  
Set the details for each task as required. Enter a completion date only when the task is fully completed. Press Next to continue.

Task Code	Task Name	Start Date	Completion Date	Task Status	Date of status change	Staff	%	Comments	Show history
Assign	Write assignment on safety	15/10/2013	22/10/2013	Task result assigned	22/10/2013	Cassady, Neal	75		...
Chem	Chemistry assignment								...
Discuss	Class discussion								...
Drinks	Buy drinks for trainer								...
Excurs	Excursion								...
LectAtt	Attend lecture								...

Cancel Back Next

**A result is finally given for the assignment on 22/10/2013. As no more needs to be done to this assignment once a result is given, we record this date as the completion date as well as the date of status change.**

Once a completion date has been entered, the task will appear as done in the client's task listing:

- Kerouac, Jack (00841) [2271] - No payments
  - Events
  - Placements
  - No payments found
  - Tasks
    - Assign (Done 22/10/2013)**
    - Chem (Not Done)
    - Discuss (Not Done)
    - Drinks (Not Done)
    - Excurs (Not Done)
    - LectAtt (Not Done)
- Quattro, Suzi (00244) [2262] - No payments
- Walsh, David (00695) [2261] - No payments

If we look again at the task history, we can clearly see all the stages the task has gone through:

**Vf Enrolment Task History Wizard: Write assignment on safety: Kerouac, Jack (00841) [2271]**

View task activity history.  
View activity history items for the enrolled task. Click on column headings to sort.

Enrolment task activity history: Write assignment on safety (Assign)  
Enrolment: Kerouac, Jack (00841) [2271] : 14/10/2013 - 13/11/2013

Task Code	Start Date	Completion Date	Completion date recorded by	Task Status	Date of status change	Staff	%	Comments	Recorded on	Recorded by
Assign	15/10/2013			Assignment sul	15/10/2013	Flinstone, Wendy			22/10/2013 10:10	VETtrak, Trakker
Assign	15/10/2013			Assignment wil	15/10/2013	Cassady, Neal			22/10/2013 10:10	VETtrak, Trakker
Assign	15/10/2013			Assignment re-	17/10/2013	Cassady, Neal			22/10/2013 10:10	VETtrak, Trakker
Assign	15/10/2013			Assignment wil	21/10/2013	Cassady, Neal			22/10/2013 11:10	VETtrak, Trakker
Assign	15/10/2013	22/10/2013	VETtrak, Trakker	Task result ass	22/10/2013	Cassady, Neal	75		22/10/2013 11:10	VETtrak, Trakker

Close

### 1.3.6 Deleting Units

If a unit is deleted from an occurrence or occurrence enrolment, any tasks associated with the unit will NOT be removed, but will remain as 'orphaned' tasks. It is not considered appropriate to remove the tasks, as they may have already been completed, in which case removing the tasks would delete historical information about work undertaken by the enrolled client(s).


### 1.3.7 Linked Enrolments




Where a client is indirectly enrolled in an occurrence's units via a linked parent enrolment, any results automatically generated by task completion will be passed on to the unit in the parent enrolment.

### 1.3.8 Rules for Unit Results due to Task Activity


When task activity is recorded, units are automatically resulted as follows:


#### **When activity is recorded against the first task associated with a unit**

The following will occur as long as the **Automatically start units** box is ticked in the [Task Configuration Wizard](#) , and the unit does not already have a result:

- The unit is automatically given the result specified under **Result type when auto starting a unit** in the [Task Configuration Wizard](#) .
- The start date is set according to the criteria specified in the Task Configuration Wizard.
- The finish date is set to the number of months after the task start date that is set under **Months in future to set unit end date when automatically started**, in the [Task Configuration Wizard](#) 
  - If activity is recorded for more than one task for the unit, the latest activity date (whether start or completion) is used for the calculation of the finish date.
  - If the end of the enrolment is earlier than the date set here, the end date of the enrolment will be set instead.
  - However, if the latest task start date is also after the enrolment end date, then the the number of months set in the [Task Configuration Wizard](#)  will be used.

#### **When all of the tasks associated with a unit are completed**

The following will occur as long as the **Automatically complete units** box is ticked in the [Task Configuration Wizard](#) , and the unit does not already have a completed-type result.

- The unit is automatically given the result specified under **Result type when completing a unit** in the [Task Configuration Wizard](#) .
- The start date is set to the start date specified for the first task.
- The finish date is set to the date the last task was completed.

#### **Notes Regarding Unit Dates**

- The calculated unit start date will use the same preferences (from the Task Configuration Wizard) when recording either a unit started or a unit completed result.
- Unit start dates are never overwritten when auto-resulting a unit. If there is an existing start date recorded for a unit, that date is used when auto-resulting the unit.
- When auto-completing a unit, if the calculated unit end date is before an existing unit start date, the unit resulting is aborted and the message below is displayed. The user will need to manually record the unit result.

